



# **Guide to setting up IRIS AE Suite™**

## **IRIS PAYE-Master**

April 2019

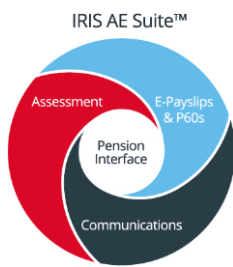


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Dear Customer,

Welcome to your guide to setting up and using the IRIS AE Suite™ web portal.



The IRIS AE Suite™ consists of several elements, including Auto enrolment (within your payroll software), IRIS OpenEnrol and IRIS OpenPayslips/P60s.

For more details on the IRIS AE Suite™ please contact Sales on **0344 815 5656**

The Guide will describe how to set up and use each function on the web and also within your payroll software.

The Guide contains instructions on setting up the cloud portal for the following elements of the IRIS AE Suite™:

- **IRIS OpenEnrol**
- **IRIS OpenPayslips and P60s**

Further help can also be found on our [website](#)

## What is IRIS OpenEnrol?

IRIS OpenEnrol is an element of the IRIS AE Suite™; a new way to distribute workplace pension communications to employees. Letters that need to be sent to employees, in order to comply with legislation, will be created automatically when you run the payroll. They will then be published to a secure online portal. The letters are emailed directly to each employee, and once they have registered with the portal they will be able to quickly view all of their past automatic enrolment letters in an easy to access, secure area.

## What will IRIS OpenEnrol do for me?

- Employees receive pension communications directly via email
- Letters can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases Automatic Enrolment administration efficiency
- Reduces carbon footprint demonstrating an environmentally friendly solution
- Reduces communication distribution costs including printing, postage and processing
- Fully secure
- Allows employees immediate 24/7 access to their own pension communication information
- Free IOS, Android and Windows Phone apps available for employees to securely view their own pension communications on tablets or smartphones
- You can log into IRIS OpenEnrol and print any communications if an employee does not have an email address
- All published communications are date stamped for audit purposes and a copy stored against the employee record

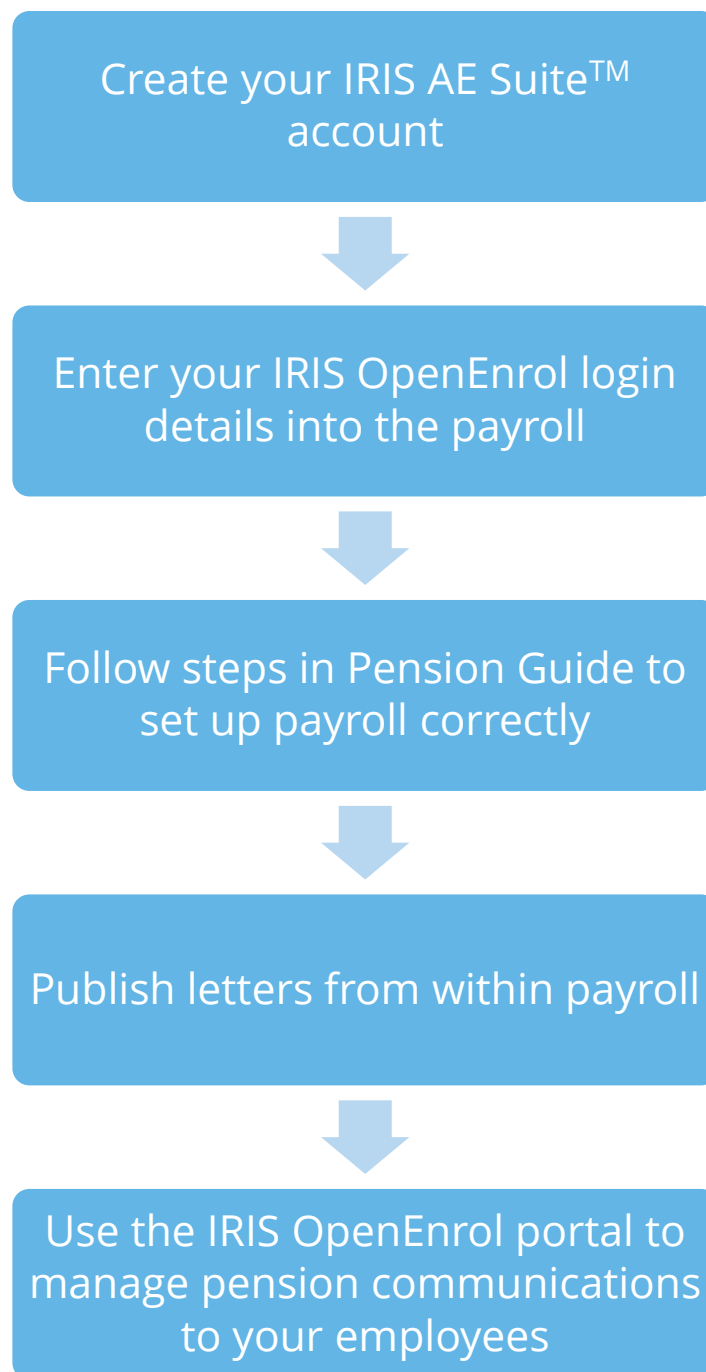
## How does IRIS OpenEnrol work?

Certain Automatic Enrolment triggers during the payroll run will cause a communication to be created, which you then need to publish to the IRIS OpenEnrol secure website. IRIS OpenEnrol takes that data and creates letters in the form of Adobe PDF files to be sent to your employees.

- If the employee has an IRIS OpenEnrol account an Adobe PDF version of the letter will be emailed to the employee and stored online
- If the employee does not have an account but has an email address they will still receive the pension communication but will also be asked if they wish to set up their online account. The letter content is in the email, meeting the TPR key requirements
- If the employee does not have an email address, log into IRIS OpenEnrol to print the required letter

When you Publish for a company for the first time, the company and employee details are created for you in IRIS OpenEnrol.

## Steps to setting up and using IRIS OpenEnrol



## How to create an IRIS OpenEnrol account

If you have an IRIS OpenPayslips account you do not need to set up a new account for IRIS OpenEnrol; you can click the **Login** button and login as normal

1. Once you have signed up for the IRIS AE Suite™ you will receive an email confirming your IRIS OpenEnrol account has been created. Click on the link to confirm your Contract and Direct Debit details



### SIGN-UP - IRIS OpenEnrol

Dear Test Test,  
Thank you for expressing your interest in IRIS OpenEnrol. In order to process your order please follow the link below.

**What do you need to do?**

- Click on the link below to confirm your Contract and Direct Debit Details:  
<https://payslips.irisopenapps.co.uk/Sales/ReviewSalesRegistrationData/?Id=7533&token=bfe4254d-456a-487b-a04f-4f980195dff6>

2. You will then receive an email confirming your account has been created. Click on the link in that message to complete your registration



### Activate Your OpenPayslips Account

Dear Tom Hext,  
Thank you for signing up to OpenPayslips.  
To complete your registration click <https://www.irisopenpayslips.co.uk/account/confirm/163e6b9e-2ff2>.  
If you have any questions regarding the product please contact our Support Team who can assist on technical queries via [www.iris.co.uk/contactsupport](http://www.iris.co.uk/contactsupport).  
As a reminder, please note that your use of OpenPayslips is governed by the terms and conditions you agreed to when you signed up, available here: <https://www.irisopenpayslips.co.uk/Home/TermsAndConditions>.

3. Enter your **New password**, **Confirm new password** and click on the **Set Password** button



### Enter your chosen password

Thank you for registering with IRIS OpenPayslips, please enter your password below

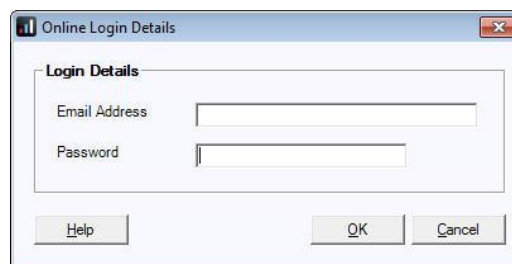
Email address	<input type="text" value="quarriesoffice@yahoo.co.uk"/>
First Name	<input type="text" value="Tom"/>
Last Name	<input type="text" value="Hext"/>
New password	<input type="password"/>
Confirm new password	<input type="password"/>
<input type="button" value="Set Password"/> <input type="button" value="Cancel"/>	

4. Another email will be sent confirming those password details. You are now ready to use IRIS OpenEnrol

## How to set up IRIS OpenEnrol in the payroll software

The **New Administrator - Email Address** needs to be added to the payroll software and all employees must have a valid email address.

1. Log into **Payroll**, click on **Utilities | Change Passwords | Online Login Details**
2. Enter the **Email Address** and **Password** registered on the portal and click **OK**



To enable you to set login details for a specific company, if you log into the company and then enter the **Username** and **Password** in **Utilities | Change Passwords | Login Details** this will restrict the published data that can be seen to this **Username/Password** only

If you have entered the **Username** and **Password** in **Utilities | Change Passwords | Login Details** when not logged into a company; these will be used as the default for any companies without specific **Login Details**

3. Make sure all employees have an up-to-date, valid email address within **Employee Details**

For IRIS OpenEnrol to operate correctly it is vital for certain information to be present. Instructions on what else you must do can be found in the Pension Guide, which you can access via the Pension menu in your payroll software

The Pension Guide also details how the letters are created and how to publish them

We recommend that a payroll is finalised prior to publishing IRIS OpenEnrol communications. If payroll is recalculated and communications have not been sent, they can be amended or deleted before the pay period is complete



## How to administer your employees' pension communications using IRIS OpenEnrol

1. Visit the IRIS OpenEnrol website at <https://www.irisopenpayslips.co.uk/> and click the **Login** button



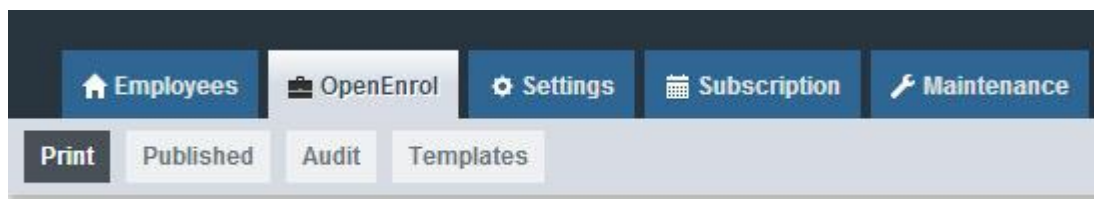
The image shows the login page for IRIS OpenEnrol. It features the IRIS logo and the text 'OpenEnrol OpenPayslips'. There are two input fields: 'Username' with the placeholder 'user@example.com' and 'Password'. Below the password field is a checkbox for 'Remember me?' and a link for 'Forgot your password?'. At the bottom, there are two buttons: 'Login' and 'Cancel'.

2. Enter here the login details you entered when you created the IRIS OpenEnrol account. **User name** is the **Email Address** you used. Click the **Login** button

**NOTE:** To receive a password reminder simply click the **Forgot your password?** link

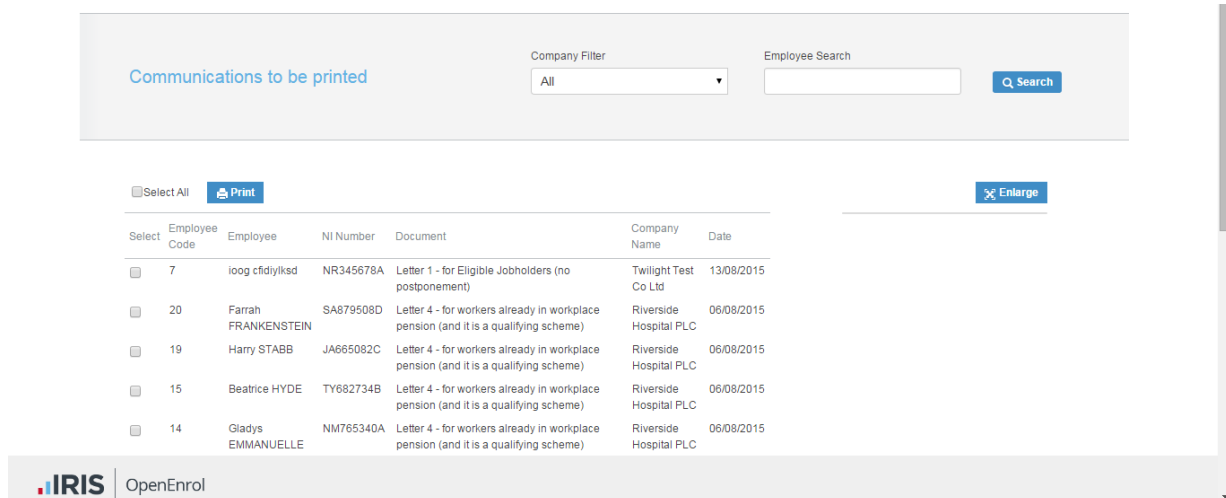
The first screen you see on logging in is the **Employees** tab. This is a summary of what's happened recently within the company.

3. Click on the **OpenEnrol** tab



The **OpenEnrol** tab has four views, **Print**, **Published**, **Audit** and **Templates**. It opens by default on the **Print** view.

## Print



Communications to be printed

Company Filter: All

Employee Search:

Select All

Select	Employee Code	Employee	NI Number	Document	Company Name	Date
<input type="checkbox"/>	7	ioog cfidiylksd	NR345678A	Letter 1 - for Eligible Jobholders (no postponement)	Twilight Test Co Ltd	13/08/2015
<input type="checkbox"/>	20	Farah FRANKENSTEIN	SA879508D	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	19	Harry STABB	JA685082C	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	15	Beatrice HYDE	TY682734B	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	14	Gladys EMMANUELLE	NM765340A	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015

IRIS | OpenEnrol

Ideally your employees will have email addresses set up within the payroll software so that when you click the **Publish** button (as described within the **Pension Guide**) the pension communications will be sent automatically via email to those employees. They will also be able to set up their own IRIS OpenEnrol accounts, and access their own communications via the portal.

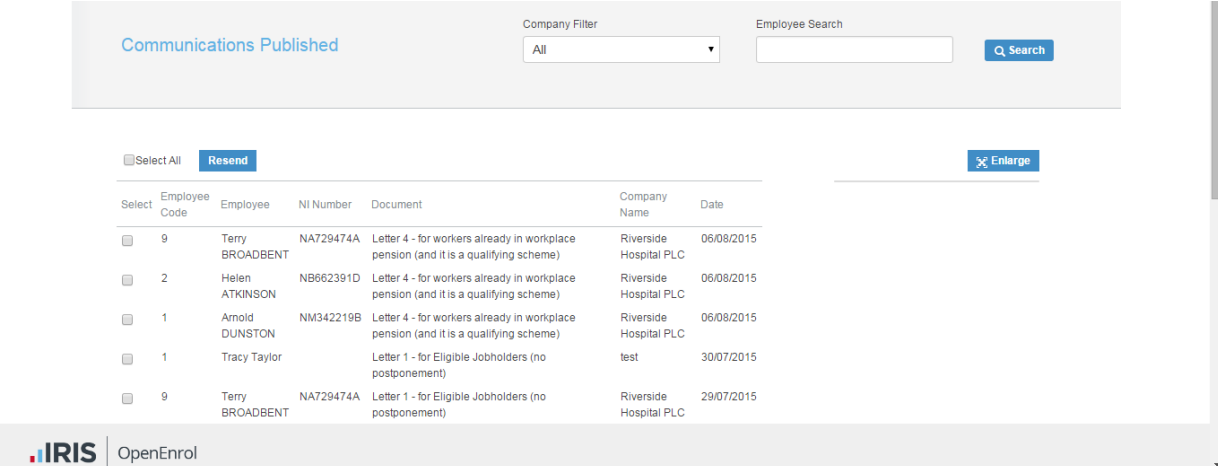
However there may be some employees who are unable to receive their communications this way as they do not have an email address. You are able to print their letters via this **Print** section of the IRIS OpenEnrol portal and send them a physical copy, whilst retaining a record of having sent the communication for audit purposes.

1. Use the **Client Filter** to view results by company, and **Employee Search** to find particular individuals
2. Click the **Select All** box or tick the boxes to select particular letters. Then click the **Print** button

## Published

You may need to resend emails or merely see what communications have been sent. To do this:

1. Click the **Published** button to open the **Published** view



Communications Published

Company Filter: All

Employee Search: [ ] [Q Search]

[Select All] [Resend] [Enlarge]

Select	Employee Code	Employee	NI Number	Document	Company Name	Date
<input type="checkbox"/>	9	Terry BROADBENT	NA729474A	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	2	Helen ATKINSON	NB662391D	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	1	Arnold DUNSTON	NM342219B	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	1	Tracy Taylor		Letter 1 - for Eligible Jobholders (no postponement)	test	30/07/2015
<input type="checkbox"/>	9	Terry BROADBENT	NA729474A	Letter 1 - for Eligible Jobholders (no postponement)	Riverside Hospital PLC	29/07/2015

IRIS | OpenEnrol

You are able to view a list of all the emailed communications, as well as resend the emails if necessary, from this screen

2. Use the **Client Filter** to view results by company, and **Employee Search** to find particular individuals
3. Click the **Select All** box, or tick the boxes to select particular letters. Then click the **Resend** button to resend the emails previously sent through the payroll software

## Audit


**Audit**

From  To  Document  Company Filter

Employee Search  [Q Search](#)

[Quick Report](#)

Employee Code	Employee	Date	NI Number	Document	Version	Template	Company Name	Printed/Emailed
7	loog cfidiylksd	13/8/2015 15:12	NR345678A	Letter 1 - for Eligible Jobholders (no postponement)	2.4	View Template	Twilight Test Co Ltd	To Be Printed
1	Hilary Greenheld	13/8/2015 15:05	NR569924B	Letter 1 - for Eligible Jobholders (no postponement)	2.4	View Template	Twilight Test Co Ltd	Printed
6	aergaer	13/8/2015	NR562398A	Letter 1 - Opt in/Joining Scheme	2	View	Twilight Test Co	Printed

 OpenEnrol

The **Audit** section is primarily for the Pensions Regulator, so you can provide evidence that you are meeting your legal obligations regarding pension communications.

1. Use the filters **From**, **To**, **Document**, **Client Filter** and **Employee Search** to narrow the list of entries as required
2. Click the **Quick Report** button to download a PDF version of the data on your screen

Template History

Template Type	Version	Reason For Change	Live Date	View
Auto Enrolment Is Coming	1.3	Logo changed	2015-07-16	<a href="#">View Template</a>
Letter 1 - for Eligible Jobholders (no postponement)	2.4	Logo changed	2015-07-16	<a href="#">View Template</a>
Letter 1P - for Eligible Jobholders (Postponement Version)	2	Initial Version	2014-12-03	<a href="#">View Template</a>
Letter 1T - for Eligible Jobholders (Transitional Version)	2	Initial Version	2014-12-03	<a href="#">View Template</a>
Letter 1 - Opt in/Joining Scheme	2	Initial Version	2014-12-03	<a href="#">View Template</a>
Letter 2 & 3 - for Non-Eligible Jobholders and Entitled Workers	2	Initial Version	2014-12-03	<a href="#">View Template</a>
Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	2	Initial Version	2014-12-03	<a href="#">View Template</a>
Letter 6 - for all workers - postponement	2	Initial Version	2014-12-03	<a href="#">View Template</a>

« ‹ 1 › »
Displaying items 1 - 8 of 8

OpenEnrol

Finally, you can view the various **Templates** that are in use to create the letters, see what the current versions are and edit them in order to add your own logo and signature.

1. Click on the **Templates** button to open the **Templates** view
2. In the **View** column, click on the **View Template** link next to the template you are interested in
3. The screen will change to the **Edit Template** view. This will show the changes that have been made to that particular template, and when they were made

Edit Template

← Back
⬇ Edit Logo...
⬇ Edit Signature...

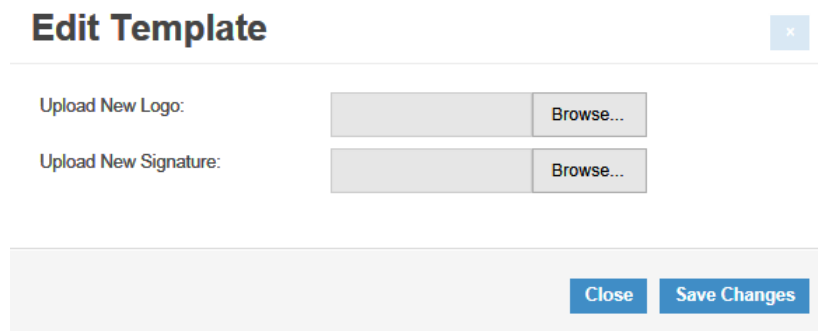
Version	Document	Reason of Change	Live Date	View Template
1.3	Auto Enrolment Is Coming	Logo changed	2015-07-16	<a href="#">View Template</a>
1.2	Auto Enrolment Is Coming	Logo changed	2015-07-16	<a href="#">View Template</a>
1.1	Auto Enrolment Is Coming	Logo changed	2015-07-16	<a href="#">View Template</a>
1	Auto Enrolment Is Coming	Initial Version	2014-05-20	<a href="#">View Template</a>

« ‹ 1 › »
Displaying items 1 - 4 of 4

OpenEnrol

To add your logo to the template:

1. Click the **Edit Logo** button

A screenshot of a web application dialog box titled "Edit Template". The dialog has a close button (an 'x' in a square) in the top right corner. Below the title bar, there are two rows of input fields. The first row is labeled "Upload New Logo:" and has a text input field followed by a "Browse..." button. The second row is labeled "Upload New Signature:" and also has a text input field followed by a "Browse..." button. At the bottom right of the dialog, there are two buttons: "Close" and "Save Changes".

(This screen may look slightly different if using a browser other than Internet Explorer)

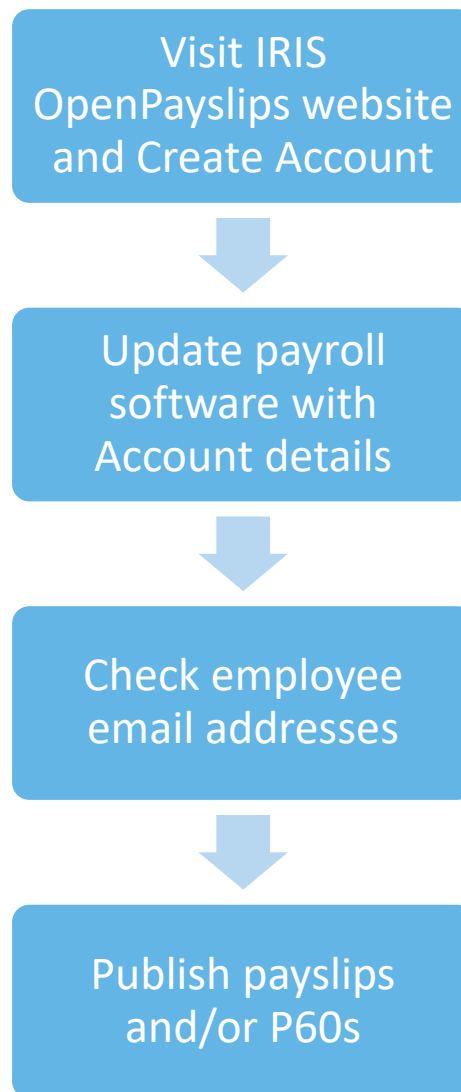
2. Click the **Browse** button next to **Upload New Logo** then browse for your logo on your system and click **Open**
3. Click **Save Changes** and your amended template will appear in the list as the latest version. Click the **View Template** link to view a PDF of your amended template

## What is IRIS OpenPayslips?

IRIS OpenPayslips is a new way to distribute payslips and P60s to employees. Payslips and P60s are published from within the payroll software to a secure online payslip portal. Once employees have registered with the portal they are able to quickly view all of their current and historic payslips and/or P60s in an easy to access, secure area.

- All payslip/P60 information is taken directly from the payroll software and displayed exactly how they are usually seen
- Payslips/P60s can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases payroll processing efficiency
- Reduces carbon footprint demonstrating an environmentally friendly solution
- Reduces payslip/P60 distribution costs including printing, postage and processing
- Fully secure
- Allows employees immediate 24/7 access to their own pay information
- Easy access to historical pay information for both employer and employee
- Free IOS, Windows phone and Android apps available for employees to securely view their own payslips/P60s on tablets or smartphones

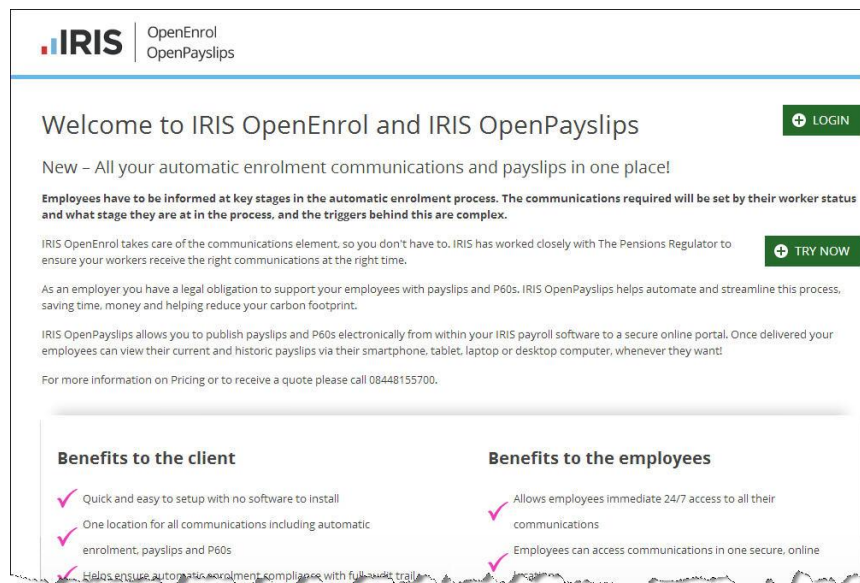
## Steps to setting up and using IRIS OpenPayslips



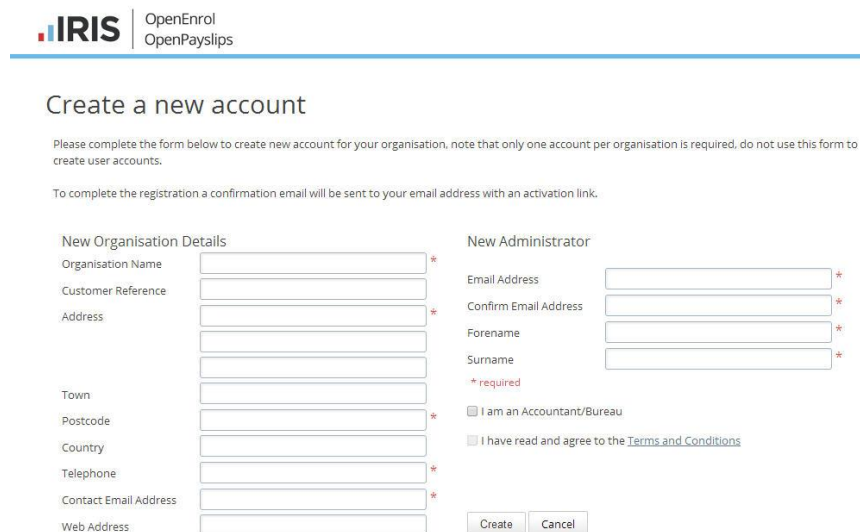


## How to create an IRIS OpenPayslips account

1. Visit the IRIS OpenPayslips website [here](#)



2. Click **Try Now** to open the following screen:

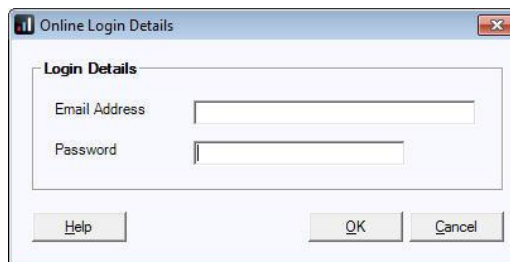


3. Enter the required details then click **Create**. An activation email will be sent to the **New Administrator - Email Address**
4. Click the link in the email to be taken back to the IRIS OpenPayslips website
5. Enter a **Password** and click **Set Password**

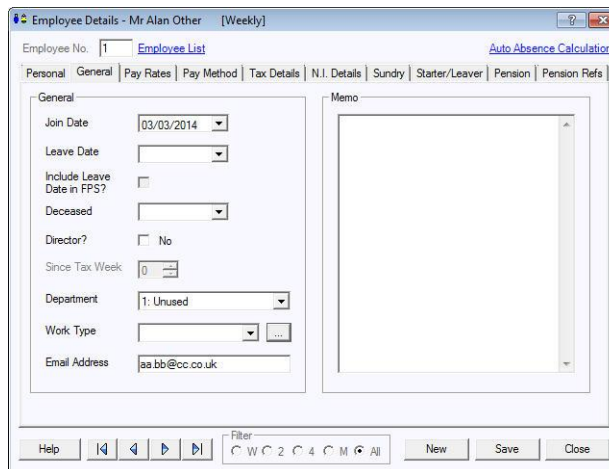
## How to update the payroll software

The new **Administrator - Email Address** needs to be added to the payroll software and all employees must have valid email addresses.

1. Log into **Payroll**, click on **Utilities | Change Passwords | Online Login Details**
2. Enter the **Email Address** and **Password** registered on the IRIS OpenPayslips website and click **OK**



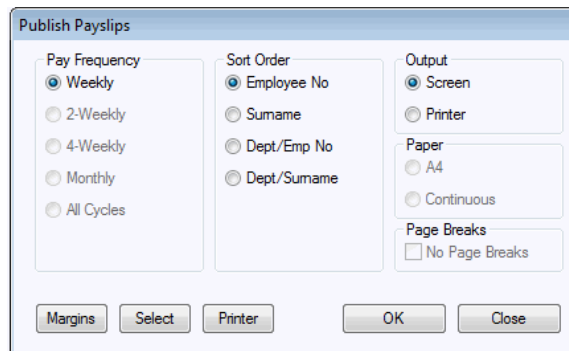
3. Make sure all employees have up-to-date, valid email addresses within **Employee Details**



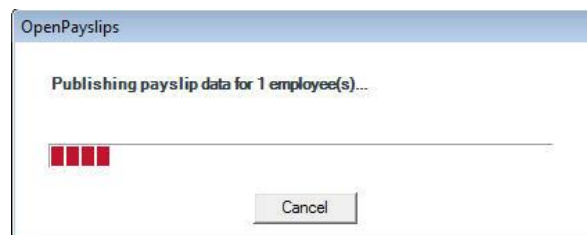
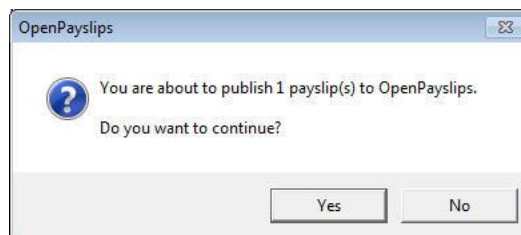
## How to publish payslips/P60s to the IRIS OpenPayslips portal

### Payslips

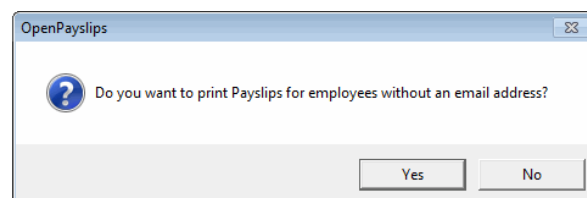
1. Once you have calculated the payroll from the **Pay** menu, select **Payslips | Publish Payslips**



2. Click **OK**
3. A message will be displayed advising you are about to publish payslips to IRIS OpenPayslips, click **Yes** to continue



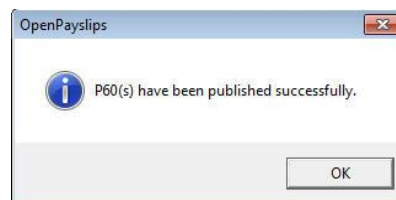
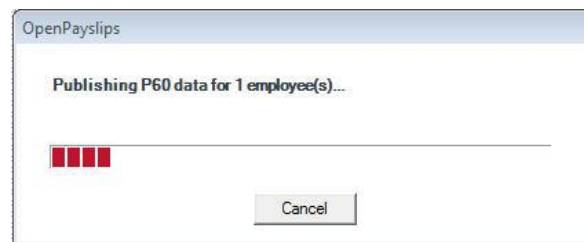
4. If not all employees have an email address, a message will appear asking if you wish to print payslips for those individuals



5. Select **Yes** or **No**
6. All employees paid in the selected pay period with an email address will then be sent an email asking them to register with the IRIS OpenPayslips website to view/print their payslip

## P60s

1. From **Year End | Print P60s**, select **Publish P60s**
2. Select the **Pay Frequency** then click **OK**



3. All current employees paid in the tax year with an email address will then be sent an email asking them to register with the OpenPayslips website to view/print their P60

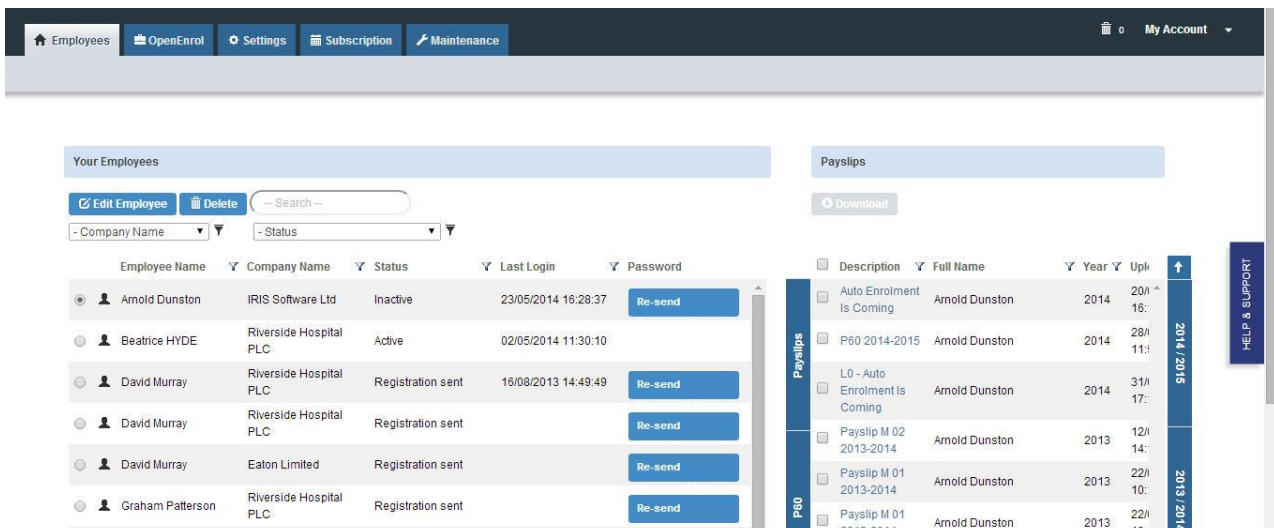
## How the employer views the published payslips/P60

To view the published payslips/P60:

1. Go to the IRIS OpenPayslips website at <https://www.irisopenpayslips.co.uk/> and log in with the registered email address and password
2. Click on an employee's name and the screen will change on the right to show their communications
3. Select the tax year on the right that you wish to look at, then click on either the **Payslips** tab or **P60** tab. The screen will change again to show the payslips/P60s uploaded for the employee in that tax year
4. Click on the Payslip or P60 and a new browser tab will open containing a copy to be viewed or printed as needed
5. Click back to the first browser tab to return to IRIS OpenPayslips

## Managing the IRIS OpenEnrol & IRIS OpenPayslips Account

The main page has five tabs on the top left, **Employees**, **OpenEnrol**, **Settings**, **Subscription** and **Maintenance**. (**IRIS OpenEnrol** is detailed earlier in this guide)



The screenshot displays the IRIS OpenPayslips web interface. At the top, there is a navigation bar with tabs for 'Employees', 'OpenEnrol', 'Settings', 'Subscription', and 'Maintenance'. On the right side of the navigation bar, there is a 'My Account' dropdown menu. Below the navigation bar, the main content area is divided into two sections: 'Your Employees' and 'Payslips'.

**Your Employees** section includes a search bar, a 'Download' button, and a table with columns for Employee Name, Company Name, Status, Last Login, and Password. The table lists several employees, including Arnold Dunston, Beatrice HYDE, David Murray, and Graham Patterson, with their respective company names and status.

**Payslips** section includes a 'Download' button and a table with columns for Description, Full Name, Year, and Upl. The table lists various payslips and P60s, including 'Auto Enrolment Is Coming', 'P60 2014-2015', 'L0 - Auto Enrolment Is Coming', 'Payslip M 02 2013-2014', 'Payslip M 01 2013-2014', and 'Payslip M 01 2013-2014'.


## Employees

The **Employees** tab displays all employees from all companies in the payroll software that have had payslips/P60s published to IRIS OpenPayslips, along with their current **Status**.

The list of employees can be sorted using any of the columns; **Status** shows whether a registration email has been sent and whether the employee has registered with IRIS OpenPayslips yet.

### How to edit an employee's details

1. On the **Employees** tab select the individual using the buttons on the left, then click **Edit Employee**



2. Amend details, then click **Update**

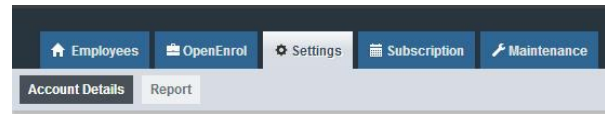
If an employee's email address changes, you must update it in the payroll software AND here, as it will not sync automatically when you publish payslips/P60s

## IRIS OpenEnrol

**IRIS OpenEnrol** is an element of the IRIS AE Suite™ detailed earlier in this guide

## Settings

The **Settings** tab has two buttons on the top left, **Account Details** and **Report**. When the **Settings** tab is selected it opens by default on the **Account Details** view.



- **Account Details** shows the account administrator details. These can be updated by clicking the **Edit** button
- From the **Report** button you can:
  - Use the **Audit Log Report** to view a list of all actions taken within this account. Use the **Search** box to filter the results if required
  - View **Published Payslips History** to create a report showing the number of files uploaded per payroll company. Enter the relevant dates and click either **Data Export (.CSV)** or **Print View**
  - View **Changed Employee Emails** showing previous email addresses and what they have changed to

## Subscription

The **Subscription** tab has two sections, **Contract** and **Invoice History**.

- **Contract** displays your **Start Date** and **End Date**
- Click on **Invoice History** to view, print or export invoices

## Maintenance

The **Maintenance** tab allows you to recall payslips that have been sent in error. You can recall **Payslips, P60s** and **Pensions** information by clicking on the relevant button at the top of the screen.

To recall a document:

1. Tick the box next to the relevant document or click the **Select All** box if you need to recall everything
2. Click the **Recall** button

This will remove the published document from the website, **it will not recall the actual sent email** (which in the case of Pensions includes a copy of the letter). If the employee tries to click on the link to the payslip/P60 in the email, it will not work.